



NAVAL POSTGRADUATE SCHOOL

MONTEREY, CALIFORNIA

MBA PROFESSIONAL REPORT

**NAVY ADVERTISING: TARGETING
GENERATION Z**

December 2015

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REPORT DOCUMENTATION PAGE			<i>Form Approved OMB No. 0704-0188</i>	
Public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instruction, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Washington headquarters Services, Directorate for Information Operations and Reports, 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302, and to the Office of Management and Budget, Paperwork Reduction Project (0704-0188) Washington DC 20503.				
1. AGENCY USE ONLY (Leave blank)		2. REPORT DATE December 2015		3. REPORT TYPE AND DATES COVERED MBA Professional Report
4. TITLE AND SUBTITLE NAVY ADVERTISING: TARGETING GENERATION Z			5. FUNDING NUMBERS	
6. AUTHOR(S) David Anderson, Kenneth Conover, Jason Jackson, and Edwin Santibanez				
7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES) Naval Postgraduate School Monterey, CA 93943-5000			8. PERFORMING ORGANIZATION REPORT NUMBER	
9. SPONSORING /MONITORING AGENCY NAME(S) AND ADDRESS(ES) N/A			10. SPONSORING / MONITORING AGENCY REPORT NUMBER	
11. SUPPLEMENTARY NOTES The views expressed in this thesis are those of the author and do not reflect the official policy or position of the Department of Defense or the U.S. Government. IRB Protocol number ____N/A____.				
12a. DISTRIBUTION / AVAILABILITY STATEMENT Approved for public release; distribution is unlimited			12b. DISTRIBUTION CODE	
13. ABSTRACT (maximum 200 words) This study recommends improvements for Navy advertising efficiency by examining characteristics of recruits defined as Generation Z. Data gathered from five waves of the New Recruit Survey covering September 2012 to April 2015 were separated into two groups by age, with ages 17–21 representing Generation Z recruits and those over 21 as the Other generation. Four main analysis questions centered on parental influences, social media habits, and advertisements received or viewed by the recruits. Our research found that Generation Z places a high value on parental input, suggesting that advertising directly to parents may be a viable option. The research also showed that recruits recall seeing Navy advertisements on television and on the Internet far more than on any other medium; all new recruits, on average, consume advertising media the same way across different formats; print readership (mediums such as newspaper, magazine, and book) seems to be declining over time. Further research should continue to use the New Recruit Survey and link responses to the Navy's 3C1L Recruiting and Advertising budget.				
14. SUBJECT TERMS Generation Z, advertising, Navy recruiting, New Recruit Survey			15. NUMBER OF PAGES 79	
			16. PRICE CODE	
17. SECURITY CLASSIFICATION OF REPORT Unclassified	18. SECURITY CLASSIFICATION OF THIS PAGE Unclassified	19. SECURITY CLASSIFICATION OF ABSTRACT Unclassified	20. LIMITATION OF ABSTRACT UU	

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Submitted in partial fulfillment of the requirements for the degree of

MASTER OF BUSINESS ADMINISTRATION

from the

**NAVAL POSTGRADUATE SCHOOL
December 2015**

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ABSTRACT

This study recommends improvements for Navy advertising efficiency by examining characteristics of recruits defined as Generation Z. Data gathered from five waves of the New Recruit Survey covering September 2012 to April 2015 were separated into two groups by age, with ages 17–21 representing Generation Z recruits and those over 21 as the Other generation. Four main analysis questions centered on parental influences, social media habits, and advertisements received or viewed by the recruits. Our research found that Generation Z places a high value on parental input, suggesting that advertising directly to parents may be a viable option. The research also showed that recruits recall seeing Navy advertisements on television and on the Internet far more than on any other medium; all new recruits, on average, consume advertising media the same way across different formats; print readership (mediums such as newspaper, magazine, and book) seems to be declining over time. Further research should continue to use the New Recruit Survey and link responses to the Navy's 3C1L Recruiting and Advertising budget.

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LIST OF ACRONYMS AND ABBREVIATIONS

AFQT	Armed Forces Qualification Test
CPA	cost per acquisition
CPC	cost per click
CPI	cost per impressions
CPM	cost per thousand
DOD	Department of Defense
DON	Department of the Navy
JAMRS	Joint Advertising, Market Research and Studies
NALTS	National Lead Tracking Systems
NOIC	Navy Opportunity Information Center
NRC	Navy Recruiting Command
OMN	Navy Operations and Maintenance

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I. INTRODUCTION

As part of an all-volunteer force, advertising is a key component of the Navy's recruiting system. In advertising, knowing your audience is key to being successful. As society changes, researchers have been able to classify groups of people into generations based on fashion trends, core beliefs, and critical moments in history and society. Understanding how their audience thinks will enable the Navy to effectively advertise to the current generation of recruits.

Recruiting the sailors of tomorrow's Navy demands a paradigm shift in understanding, requiring differing efforts of advertising toward the new generation of recruits, referred to as Generation Z. Generation Z is different from every other generation because they were born in the mid-1990s and subsequently shaped by the events of the 2000s. They grew up in a post-9/11 era, in which America has been continually engaged in various combat missions around the world. They have had the Internet and smartphones at the forefront of their everyday lives. They lived through the greatest recession in modern times and timorously watched their parents struggle financially. These shared experiences have caused individuals in Generation Z to also share common traits.

A. SIGNIFICANCE OF THE RESEARCH

As the oldest members of Generation Z graduate from high school and become eligible to enlist, it is incumbent on the Navy to carefully study this Generation and understand what makes its individuals unique. In doing this, the Navy will be able to reach them through advertising and subsequently effectively recruit them into the Navy. Failure to understand Generation Z and adapt to its method of communication will result in reduced efficiencies and potentially missed recruiting goals.

It seems that the current focus of research has been on the millennial generation, comprising individuals who were born between 1980 and sometime in the mid-1990s. The oldest millennials are 35 years old—too old to join the Navy. With the majority of recruits who join the Navy ranging in age from 17 to 21, it is time to move past the

millennial generation and start to focus on the characteristics of Generation Z. While little has been done to research this new generation, it is important for the Navy to get ahead and understand their advertising audience in order to reach them effectively.

Making advertising more efficient can result in reduced marketing and advertising costs for the Navy and possibly improve the quality of the recruits. The goal of this study is to make recommendations on how to improve the Navy's advertising efficiency by identifying Generation Z's key characteristics and media habits using trend data. The Navy must continue to focus advertising toward this new generation in order to recruit them, but to accomplish this goal they must understand how to reach them.

The primary research question is: What habits and characteristics of Generation Z recruits differentiate them from older recruits? We obtain this information by analyzing data from the New Recruit Survey provided by Navy Recruiting Command (NRC). We seek to answer this question and provide recommendations on how to effectively advertise to the recruits of Generation Z.

B. SCOPE AND ORGANIZATION

In order to develop an understanding of advertising, the environment, and the unique characteristics of Generation Z, we began with a broad review of advertising literature. We first looked at advertising and what was considered effective advertising. Then we defined different advertising mediums to help frame the entire advertising picture. We looked at the mission and responsibilities of NRC to see what affect they have on the way the Navy fulfills its recruiting needs. We then review what current research has told us about the characteristics of Generation Z and how they differ from previous generations.

As part of our research, we gathered data from five waves of the New Recruit Survey covering September 2012 to April 2015. The data, composed of 53,442 respondents, was provided by NRC. The survey respondents were separated into two groups by age, with 17–21 representing Generation Z recruits and over 21 defined as Other. For the purpose of this project, we focused on the results of four questions that we believed would help understand the differences in the two generations. The four

questions selected focused on parental influences, social media habits, and advertisements received or viewed by the recruits.

This project concludes with remarks on how our research sheds new light on what type of advertising is effective for Generation Z and how the Navy can more efficiently and effectively advertise to this new demographic.

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II. LITERATURE REVIEW

This chapter provides background information from related literature and previous studies. It begins with a broad view, describing current advertising theories and practices. The focus then shifts to the Department of the Navy (DON), describing the recruiting command, their mission, and what they view as desirable qualities in new recruits. A summary is provided on how NRC operates, how they advertise, and how they collect data. The review concludes by linking what the Navy wants to its current pool of potential recruits, Generation Z. This chapter provides a solid foundation for the model described in Chapters II and III.

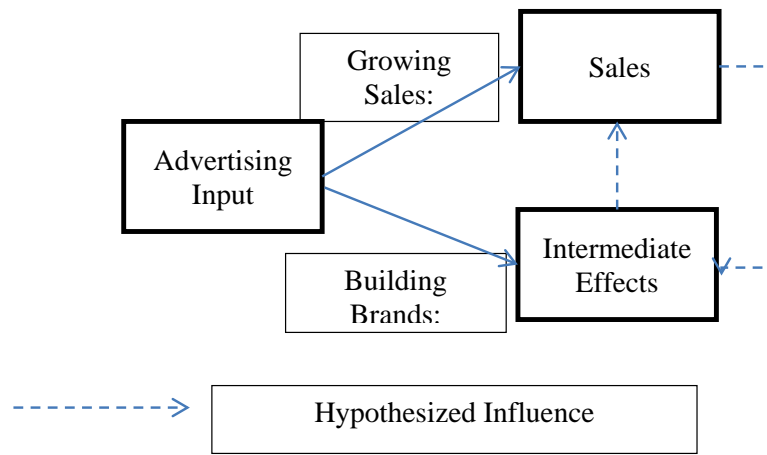
A. HOW ADVERTISING WORKS

According to Tony Yeshin, “The purpose of advertising is to modify the way individuals relate to the product or service being advertised” (2007, p. 11). For most businesses, this would mean that an individual would relate to the advertising in such a way as to be induced to buy a product, resulting in a sale and income for the business. Advertising can also “assist in the creation and maintenance of brand equity” (Yeshin, 2007, p. 11). While advertisements that promote a brand do not focus primarily on selling specific products, they promote recognition, familiarity, and goodwill about an organization, which will result in sales or the future use of the organization’s services.

Advertising and its associated budget are an important piece of an organization’s overall marketing plan. Measuring advertising effectiveness is difficult and many studies have been conducted to figure out how advertising works and how to measure it. In 2012, Norris Bruce, Kay Peters, and Prasad Naik conducted research on how advertising grows sales and builds brands. In their article’s introduction, they summarized previous research into two “distinct streams of advertising research” (2012, p. 794) (see Figure 1). The first stream of research focuses on sales and attempts to “quantify the short-and long-term impact of advertising, taking into account diminishing returns and carryover effects” (Bruce et al., 2012, p. 794). According to the authors, this is the method utilized by managers to evaluate sales performance. The second stream takes into account

intermediate effects. These intermediate effects may not immediately generate sales, but they help to build a brand and create awareness that can generate later sales. The authors mention that building a brand is the forte of advertising agencies and these intermediate effects measured via mind-set metrics “nudge consumers along the think-feel-do hierarchy in stages to induce brand purchase” (pp. 793–794).

Figure 1. Bridging Distinct Streams of Advertising Research

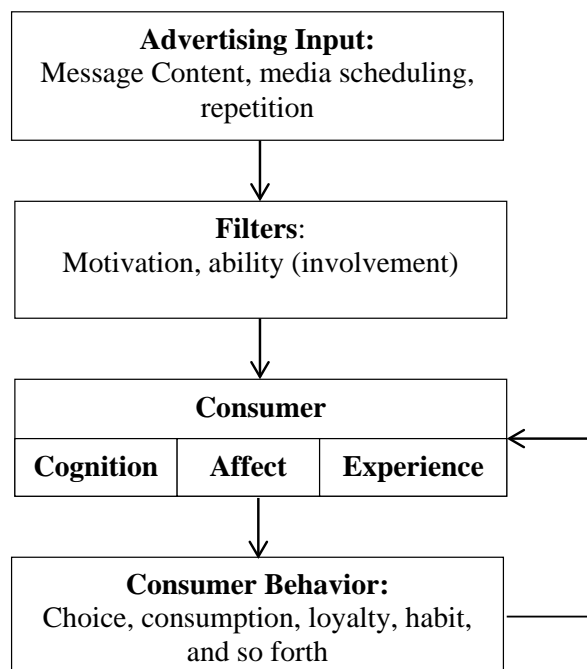


Source: Bruce, N. I., Peters, K., & Naik, P. A. (2012). Discovering how advertising grows sales and builds brands. *Journal of Marketing Research*, 49(6): 794.

It is important to expand on the concept of intermediate effects that came from a 1999 study by Demetrios Vakratsas and Tim Ambler. In the study, they conducted a review of more than 250 advertising studies to deduce a formula on how advertising works. They developed a framework, seen in Figure 2, to help classify the advertising models. The framework recognizes that advertisements do not always have an effect and initially filters out those people. For those the advertisement does affect, there are three different types of intermediate effects on the consumer. The intermediate effects are cognition, affect, and experience, and are mental responses that people have to the advertisement before they actually have a behavioral response. Cognition is the thinking dimensions and is associated with rationally thinking about a product and whether it will be useful to the person. The person uses the advertisement for information and for “reducing searching costs.” Affect is the feeling dimension, and focuses on familiarity

and emotions evoked about a brand. This is the intermediate dimension that is most associated with brand awareness. People might not be searching for a product, but the advertisement makes the viewer aware and induces positive feelings toward the brand. Experience is the memory of a product or the familiarity a person has with the product being advertised. Advertisements evoke memories of past usage and create a desire for more.

Figure 2. Hierarchy of Effects



Source: Vakratsas, D., & Ambler, T. (1999). How advertising works: What do we really know? *Journal of Marketing*, 63(1), 26-43.

By using the framework and classifying studies into different models using combinations of these intermediate effects, Vakratsas & Ambler were able to make generalizations about advertising. They found that the three intermediate effects are key to advertising and should all be considered, but that there is no real support for a hierarchy of effects meaning there is no order to the intermediate effects.

Understanding how an advertisement is received and how it affects consumers is important in crafting a particular ad. The Navy is not selling a product, but rather a

lifestyle, so advertising is focused on building a brand which is the domain of intermediate effects. Navy advertisements make heavy use of cognition, by making their audience think about their future. They make use of Affect by evoking patriotic feelings or feeling of service. While the intermediate effect of Experience cannot be used much as potential recruits do not have past experiences, it is an effect that has an impact on prior service people such as parents and teachers who are influencers of potential recruits.

B. ADVERTISING MEDIUM

Companies know they must advertise to draw attention to their product or service so the next logical step in the process is deciding where to and how to advertise. To make decisions, advertisers must be aware of the types of medium and how each can be utilized. Some companies advertise using multiple forms of medium while others use only a single type. The most common six medium types are listed in this section, with a brief description of each.

1. Magazines

Magazine advertising can target specific audiences in order to generate impressions. In Guy Consterdine's *How Magazine Advertising Works* (2005), he concludes that magazines sell products, build awareness, provide effective targeting, and add value opportunities. Magazines are able to directly target demographic based audiences or interested parties easily and without much waste. Consterdine also noted, there is a strong relationship between the reader and the magazines they choose to read. Readers are usually very interested in the magazines they buy and the magazine and its contents can have considerable impacts on the reader. Magazines cater to a certain group of individuals; advertisers know this and plan accordingly. Magazines often extend beyond the original buyer/reader. Magazines are often not read just once and the reader has the ability to control the amount of time they spend on any given page, including the advertisements.

Further research in magazine and print media advertisements support claims as to their effectiveness. Consterdine also found that adults were more likely to act as a result of seeing a magazine advertisement than they were in other media. Additionally, not all

print ads are equal. They found that adults were nearly twice more likely to act on a magazine advertisement than they were on one seen in a newspaper.

2. Newspapers

Newspaper advertisements are very similar to those placed in magazines. In 2010, The Newspaper Association of America conducted a study that was executed by Scarborough Research which provided a list of ten reasons why companies should advertise in newspaper. The first was that newspapers reach, nationally, about 105 million adults either in print or online, with 7 in 10 adults reading a paper or visiting a newspaper website in a given week. Second, people who read the newspaper are usually considered to have higher income, higher education, and have upper managerial occupations than those who do not read a newspaper. Third, ad placement in the paper can target readers. Fourth, ads can be created and run in a matter of days. Fifth, newspapers allow advertisers to build ads in any size. Sixth, surveys show that more American adults trust the printed newspaper when compared to other sources. Seventh, shoppers seek advertising on their own when they are interested in buying products. Eighth, the newspaper editorial environment can add credibility. Ninth, newspapers are convenient, up to date, trustworthy, believable, and preferred. Finally, newspaper ads create traffic, with thousands of messages a day. (Action figures, 2010)

However, a 2013 study by the National Bureau of Economic Research found that newspaper-advertising revenues have dropped 47% from 2005 to 2009 and continue to decline (Athey, Calvano, & Joshua, 2013). The decline in advertising revenue and overall newspaper use is primarily a function of the rise and constantly spreading use of the Internet.

3. Direct Mail

Direct mail advertising often comes in the form of informative literature that is mailed out to a select group of individual addresses. Along with the literature a response or reply prompt is usually included. Direct mailings can be sent to large groups covering multiple geographic locations or smaller more targeted and unique audiences. For example, based on data collected, companies such as colleges can target 17–22 year olds

in specific regions of the country. Much like other forms of advertising it is effective in increasing awareness of a particular product and when it is mailed directly to you there is more of a personal feel to the advertisement.

4. Radio

Radio advertising also lends itself to be quite selective, similar to magazines and newspapers. Paid radio advertising is broken down into two cost: airtime and production. Both of these costs are on average significantly less expensive than those for television advertising. Advertisers also have the ability to schedule when they want their ads aired in order to more effectively reach their target audience. With the associated sounds and music the targeted repetition of radio advertising makes it very effective.

5. Television

Television advertising allows for the best/most efficient combination of senses to be reached. Combining sight and sound advertisers can more holistically provide a snapshot of their product or service in a short amount of time. Television time often comes at a high premium with increased airtime and production costs. Television has the ability to reach a wide variety of consumers by running ads during peak times on popular channels. By selecting certain times of the day or channels on which ads are run advertisers increase their likelihood of reaching their intended audience.

6. Online

The advertising industry has sought to follow the consumer, to go where they go. With the Internet now becoming a large part of individuals social and business life advertisers have ventured into the web to get to consumers. The field of online advertising is relatively new in the marketing world, getting its start in the late 1990s (Tuten, 2008, pp. 5–6). As a part of the advertising “mix,” Internet advertising continues to grow into one of the largest portions of promotional advertising. Advertising online has such large amounts of power because it can target individuals based on their preferences or large masses like billboards and commercials on popular sites. Internet advertising has made consumer response easier, cheaper, and faster. Online advertising in

of itself is as diverse as all of the other forms. Companies can use text ads, videos, and sound bites to convey their message.

The ability to track the effectiveness based on certain metrics (clicks or visits) is what is making online advertising more and more appealing to advertisers. As users are already in front of their computer they have the ability to respond directly to ads as they appear.

Social media advertising can take many forms and is often consumer-generated, meaning that advertisers “know” what you want to see based on your preferences with regard to sites visited and posts made. This kind of consumer-generated advertising allows advertisers to match products with consumers very effectively. Figure 3 is an illustrated forecast depicting the amount of money that will be spent in each of the Internet’s major advertising arenas.

Figure 3. Projected Continued Increase of Online Marketing and Advertising Spending from 2014 to 2019



Source: Peterson, T. (2014, November 4). Digital to overtake TV ad spending in two years. Retrieved from <http://adage.com/article/media/digital-overtake-tv-ad-spending-years-forrester/295694/>

C. IMPRESSIONS

Brick Marketing defines the term impression as the number of times an ad is viewed by an individual. Online impression is described as the number of times the ad is displayed on a web page. Companies often make estimates in order to project the number of people a specific advertisement will reach. Advertising online provides the most effective way of tracking impressions. The advertiser and the publisher of that advertisement generally agree upon the number of intended impressions that an advertiser wants prior to running the ad. These numbers are not concrete and users must understand that they are estimates (“What is an impression,” n.d.).

1. Price of Impressions

Impressions come at a price, and this is how companies make decisions on how much to spend on advertising. Cost per impressions (CPI) and cost per thousand (CPM) are how the price per impression is listed. Additional measurements and pricing tools are cost per click (CPC) where advertisers only pay when a consumer clicks on the ad and

cost per acquisition (CPA) where the advertisers only pay when a consumer clicks and makes a purchase. CPM is best used when a company is seeking to heighten brand awareness or deliver a specific message. (Cost per thousand, n.d.) For example, one million impressions at a cost of \$10 CPM is a \$10,000 total advertising price, which equals \$.01 per impression.

D. NAVY RECRUITING COMMAND

Now that we have established a foundation of general advertising knowledge, our focus shifts to the Navy. In particular, the organization charged with keeping the Navy accessions at a level to match demand from the fleet by constant recruiting and contracting of young individuals.

The U.S. Navy Recruiting Command mission is to “Recruit the best men and women for America's Navy to accomplish today's missions and meet tomorrow's challenges” (Mission, n.d.). In efforts to accomplish this mission, the NRC relies on approximately 4,500 recruiters. These men and women are mostly enlisted and stationed throughout major metropolitan areas and communities within the United States, with a marginal number of recruits outside the United States. Sectors covered outside the contiguous United States include: Europe, Japan, Guam, Hawaii, Alaska, U.S. Virgin Islands and Puerto Rico.

Currently, NRC is led by Rear Admiral Annie B. Andrews with its headquarters command based in Millington, Tennessee. NRC is composed of 26 Navy Recruiting Districts divided among two regions; East and West (Mission, n.d.).

E. WHO IS THE NAVY LOOKING FOR?

NRC is called upon to “seek out, source and recruit the best and brightest young men and women to sustain and maintain the cadre of ready personnel” (Mission, n.d.). In accordance with NRC’s instruction, applicants seeking to enlist must be able to demonstrate a satisfactory pattern of conduct and reflect the highest of moral character at the time of application. Otherwise, applicants would not be considered as they could become a liability for the Navy. In efforts to attain that result, NRC must strictly screen

all applicants prior to enlistment in the Navy. Such screening is based on the Navy's most basic requirements needed to enlist as an active duty Sailor. In accordance with the Navy.com website those basic entry requirements and obligations are as follows:

AGE

To serve as an Enlisted Sailor, you must be no older than 34 but at least 17 years old. If you are not yet 18, you must have parental consent. To serve as an Officer, you must be no older than 35 but at least 19 years old depending on the program desired. (Waivers may be granted for positions in high demand.)

CITIZENSHIP

To serve as an Enlisted Sailor, you must be a U.S. citizen or, if you're a non-citizen, you may join the Navy if you entered the United States on a permanent residence visa or have an Alien Registration Green Card and have 1) established a bona fide residence, and 2) established a home of record in the United States. To serve as an Officer, you must be a U.S. citizen.

FAMILY

You can enlist or join the Navy if you are a single parent; but note, the Navy will normally not allow you to enlist or join if you have more than two dependents under the age of 18.

FINANCIAL OBLIGATIONS

In certain cases, you must prove that you can meet your current financial obligations.

EDUCATION

Generally speaking, you must be a high school graduate, have earned a GED or have met other high school equivalency requirements to enlist as a Sailor in the Navy. To become an Officer, you must have received a four-year BS or BA degree from an accredited university and have strong grades.

DRUG/ALCOHOL POLICY

The Navy has a zero tolerance drug/alcohol policy. Early in the enlistment or commissioning process, you will take two urinalysis tests. You'll also

be asked questions about prior drug and alcohol use. Answer honestly. If you have questions, contact a recruiter.

MEDICAL/LEGAL/MORAL STANDARDS

The Navy also applies medical, legal and character standards to your application, including traffic offense history, criminal history, citizenship status and more.

SERVICE COMMITMENT

The amount of time you are required to serve on Active Duty depends upon many factors, including your interests, your background, your pursuit of an Officer or Enlisted position, or whether or not you are taking advantage of Navy education opportunities. In general:

Enlisted positions typically require an initial service commitment of four years (positions involving longer-term training may involve longer service obligations).

ENLISTED BASIC TRAINING

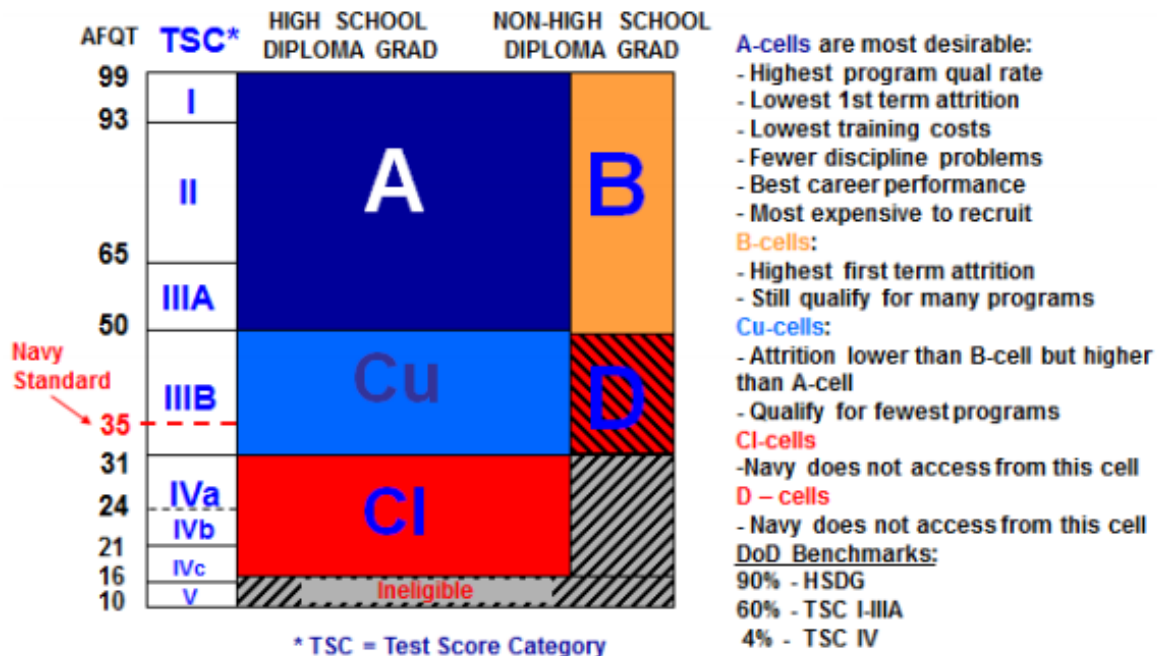
If you've never served in the military before and are entering as an Enlisted Sailor, you will need to first attend Recruit training –also known as boot camp (“Becoming Part of the Navy,” n.d.).

F. NAVY RECRUITING QUALITY STANDARDS (WHAT THE NAVY DESIRES)

Upon successful screening and satisfaction of the basic requirements for enlistment, a prospect's qualities are assessed against the Navy recruiting quality standards based upon their application records. Effectively, prospects are then grouped and categorized based on their highest level of education and their results from the Armed Forces Qualification Test (AFQT) (Henderson, 2015).

As depicted in Figure 4, the most desirable recruits are those who fall within category I and have scored between a 93 and 99 on the AFQT; these are said to be most desirable by the Navy because of qualities such as: their highest program qualification rate, lowest 1st term attrition rate, lowest training cost, fewer discipline problems, best career performance and are the most expensive to recruit (Henderson, 2015).

Figure 4. Navy Recruiting Quality Standards



Source: Henderson, T. L. (2015). Determining how to best predict navy recruiting using various economic variables (master's thesis). Retrieved from Calhoun https://calhoun.nps.edu/bitstream/handle/10945/45195/15Mar_Henderson_Timothy.pdf?sequence=1

In Timothy Henderson's 2015 thesis he describes the categories of recruits as follows. Category II is made up of those recruits scoring 65 to 92, followed by Category IIIA with scores between 50 and 64. Scores between 35 and 50, make up category IIIB; a score of 35 is the minimum standard accepted by the Navy. Note that recruits who score within categories I, II & IIIA, but who have not received a high school diploma are grouped under cell B; they still qualify for many programs and have the highest attrition rates in their first term.

Navy recruiters must overcome numerous challenges to accomplish such a critical mission of delivering the best and brightest to serve as the Navy's future generation. The seeking, tracking, and responding to young adults' inquiries about joining today's Navy is their most important responsibility. In order to find qualified and talented individuals to join the Navy, recruiters constantly travel to places where known prospects tend to

congregate. To enhance this person to person recruitment, the Navy uses marketing and advertising to enhance recruiting.

G. NAVY ADVERTISING

The Director of the Marketing and Advertising Department (N9) is responsible for planning, developing, directing, managing and coordinating all Navy Recruiting advertising and marketing activities in support of Navy recruiting (U.S. Navy Recruiting Command, 2003, p. 9-1). The N9 maintains NALTS, the NOIC, website and social media, and supervises the lead distribution system. The N9 also manages the civilian advertising agency contract.

According to NRC's standard operating procedure (SOP), NRC conducts advertising using 4 methods (U.S. Navy Recruiting Command, 2003). National Advertising occurs on a national level and is used to build awareness and generate leads that are given to the field recruiters. Additionally, national advertising serves to build brand awareness. National Advertising is contracted out to a civilian ad agency that creates and broadcasts advertisements and publications as well as major Navy websites and monitors their effectiveness. The current ad agency is Young & Rubicam, a New York-based advertising firm who took over from Campbell Ewald in June 2015. (O'Leary, 2015)

Public Service Advertising is a nationally and locally coordinated program that uses television, radio and the internet as well as print media such as billboards and newspapers to raise awareness of the Navy. Public Service advertisements are free advertising for the Navy.

Local Advertising is conducted at the Recruiting District level. The Districts are authorized funding to advertise on a local level in order to generate leads for local recruiters. They are limited in the types of media and approach they can take to ensure they conform to national standards.

Collateral Materials are produced by NRC and disseminated to the recruiting districts. These items, such as pamphlets, brochures, posters, and booklets, are used by

the districts to help in recruiting. They tie into national advertising campaigns. (U.S. Navy Recruiting Command, 2003, p. 3-1)

1. Navy Recruiting and Advertising Budget

The Navy currently tracks their advertising budget under the Activity Group: Recruiting & Other Training and Education, with the more detailed information under the subactivity group: Recruiting and Advertising. This budgeting line “supports the operation of 1,612 recruiting facilities with 4,985 authorized production recruiters and approximately 1,908 support personnel located in all 50 states and in Guam, Puerto Rico, Virgin Islands (St. Thomas), Japan, Italy, and Germany” (Department of the Navy, 2015).

The Navy’s OMN budget 3C1L (Department of the Navy, 2015) describes the actual amount spent on Recruiting and Advertising as having a negative program growth of around \$17.071 million from \$245 million in 2014 to \$231.737 million in 2015. The trend is downward, however there is still a large price growth in the Printing and Reproduction categories (\$1.434 M) as well as program growth in this same category of \$4.8 Million in 2015. In fact there are only 3 categories that had negative program growth in 2014 (Navy managed supplies and materials, other services, and printing and reproduction.) In 2015 there are 13 categories with negative program growth out of the 22 total categories available.

The Navy buys a large list of items with this budget authority, but overwhelmingly the two largest areas are for Printing & Reproduction and Civilian Pay, consuming 36% and 19% of the overall Recruiting and Advertising budget respectively. The performance criteria for Navy advertising is tracked by eligible leads with the most popular being the leads purchased from Internet Vendors and the Navy Recruiting Websites (NAVY.com and Navy Reserve.com).

The Navy’s Operations and Maintenance, (Department of the Navy, 2015) line 3C1L, Recruiting and Advertising, budget is broken down into categories. Each category represents a specific type of advertising medium, and each type receives a portion of the budget. The main categories are magazines, newspapers, direct mail, radio, television, and the Internet. The funding for each category fluctuates from year to year based on the

perceived effectiveness of each type of advertising medium. For example, magazine advertisements can create leads for the Navy through calling the 1-800 number, visiting the Navy's website, or motivating an individual to visit their local recruiting office.

The amount of money spent on each advertising medium is tied to the amount of impressions the Navy is seeking. As defined by the Navy, impressions are "the number of times the advertising is exposed to 18-24-year-old males and females as determined by the circulation of magazines or newspapers, quantity of direct mailings, etc." (Department of the Navy, 2014, p.6).

H. JOINT ADVERTISING, MARKET RESEARCH AND STUDIES

The Joint Advertising, Market Research and Studies (Market research, n.d.) program is run by the Department of Defense and is used to "explore the perceptions, beliefs, and attitudes of American youth, their likelihood to join the Military, their awareness of and reactions to military outreach efforts and advertising, and other variables that may be related to military recruiting" (Market research, n.d.). JAMRS maintains databases such as the Selective Services System Files as well as the High School Master File and College File which include names and contact information on potential recruits. The program conducts research to provide DOD an understanding of the recruiting market which includes parents, educators, and potential recruits. The JAMRS Youth Poll, conducted 4 times per years, surveys 225,000 16–24-year-olds annually to determine perceptions and awareness of the military as well as the propensity to enlist. This data is screened and compiled into potential leads that recruiters can access and use to gain access to potential recruits (Roland, 2012).

An additional purpose of JAMRS is to oversee DOD wide marketing and advertising policy. They run several websites as well as publish magazines geared toward creating interest in military careers. Responses to the marketing and other sources are compiled into a Joint leads database which is disseminated to the different Services for follow on recruiting action (Roland, 2012).

I. NEW RECRUIT SURVEY

One of the programs that JAMRS runs is the New Recruit Survey. The survey is given to new recruits to collect information on personal reasons why new recruits joined the Military. The Navy uses it to assess various aspects of recruits such as background, personal history, media habits, recruiting process, and military marketing. The survey provides insight into the outlook and attitudes of people who actually joined the Navy and data gathered from the survey helps to improve the Navy's overall recruiting process (New Recruit Survey, 2014).

J. TRACKING ADVERTISING EFFECTS

NRC uses many tools to track leads of potential recruits; NRC describes its method as follows.

Local Advertising is used to generate enlisted and officer leads for recruiter follow-up. National advertising awareness leads complement local leads. They are tracked by an established set of operating procedures similar to local leads. Both systems are tied to one another and are coordinated through the Leads Production Team using the NALTS for active leads, and Web R-Tools database for tracking enlisted and officer leads. (U.S. Navy Recruiting Command, 2012, p. 2).

Local leads are overseen by the Local Marketing and Leads Analysis Division (N94). According to the NRC Field Advertising Manual, "The primary objective of local advertising is the generation of qualified active and reserve leads for recruiter follow-up, as compared to national advertising, which is directed toward creating awareness, influencing attitudes toward the Navy, and stimulating interest about opportunities in the Navy, branding, and generation of leads" (U.S. Navy Recruiting Command, 2012, p. 1-2).

National leads are generated by the national Advertising Agency. Leads are generated through the use of all forms of ad media discussed earlier as well as through contacts developed by JAMRS. Potential applicants respond to the national advertisements through telephone by calling the 1-800 number, by returning Business Reply Cards, through various Internet communication means, and via written correspondence. The leads are captured by the Navy Opportunity Information Center

(NOIC) in Miami Lakes, Florida. The NOIC National advertising refers prospective recruits to the Navy's 1-800 number or to the www.navy.mil website (U.S. Navy Recruiting Command, 2012, p. 7-6-7). The 1-800 number is operated by the NOIC which answers calls and gathers information about an applicant including the source of advertising that generated the lead (Stoker & Mehay, 2011, p. 126). This information is then entered into the National Leads Tracks System (NALTS) which is used to track all local and nationally sourced leads. "The NALTS is a web-based application designed specifically for the processing, tracking and administration of advertising activity and leads" (U.S. Navy Recruiting Command, 2012, p. 7-2). Information on potential applicants is then forwarded to WebRTools which is a web-based recruiting tool used by recruiters to get in touch with the applicant.

K. GENERATION Z

According to Mark McCrindle, "generations are defined sociologically rather than biologically. A generation refers to a cohort of people born within a similar span of time (15 years at the upper end) who share a comparable age and life stage and who were shaped by a particular span of time (events, trends and developments)" (2009, p. 1-2). Sociologist and demographers define specific generations differently based on the particular events and characteristics they choose. These specific dates frequently cross, but there seems to be a general agreement about each cohort.

Various demographers have defined Millennials or Generation Y as the cohort of individuals born between a range of years starting between the years 1976–1982 and extending to anywhere between the years 1994–2004 (Haughn & Rouse, 2005). There are many demographers such as Bruce Tulgan in his Generation Z white paper who argue that "this time frame is simple too broad to defined just one generation" and argue that there was a change around the year 1990 that signified the start of a new generation that they have identified as Generation Z. He argues the point that Generation Z started in 1990 and is defined by handheld devices, wireless internet, helicopter parenting, the great recession and the jobless recovery (2013). Mark McCrindle defines Generation Z as those born between 1995–2009. He defines them by their access to technology, material items,

connectivity, and formal education and explains that they were shaped by globalization and the financial crisis (2009, pp. 14–15). Robert Half defines Generation Z as those born between 1990 and 1999. He defines them as “the first truly digital and global generation” that has never known a world without internet or smartphones and shaped by economic instability (2015, p. 5). In another study done by Adecco on workforce attitudes, Generation Z is defined as those born after 1995 (2015). While there does not seem to be a comprehensive agreement on the exact timing for Generation Z, there seems to be a general idea that there was a generational change starting in the early 1990’s that delineates Generation Z from the Millennials and all other previous generations.

Generation Z has grown up with the internet and cellphones ubiquitous in their everyday lives. The differences between Generation Z and previous generations are evident as you look at the different characteristics of this group. Gen Z is known to be more entrepreneurial in spirit with 17% of them wanting to start their own business up from 11% for previous generations (Schawbel, 2014). Generation Z is also less likely to be influenced by money alone. They are more likely to be motivated by the opportunity to advance within an organization. Generation Z does prefer traditional methods of communication, with most preferring a face-to-face meeting with their boss versus an electronic notification (Schawbel, 2014). Generation Z has a strong desire for management to not only listen to their ideas, but to value their opinions as well. Generation Z also wants to work for someone they consider to be an honest leader (Schawbel, 2014).

There are other very significant differences between the current generation of recruits (Generation Z) and the previous generations. Generation Z recruits are heavily influenced by their parents when making career decisions, 54% vs 16% for previous generations. This generation has “had more guidance, direction, support and coaching than any generation in history” (Half, 2015). Mom and Dad have a large influence over their children’s careers with this generation careful not to make the perceived mistakes of their parents for settling on a career or not finishing up their education. Their parents have advised them to “Stay in school,” and “Do what you love. The money will follow” (Half, 2015). Generation Z is also less likely to be influenced by friends, co-workers, or

managers when making career related decisions (RANDSTAD, 2014). Generation Z prefers work flexibility and healthcare coverage more so than the previous generations. They also prefer to work as independent consultants or for medium sized firms (RANDSTAD, 2014).

It is expected that all of these characteristics that make them Generation Z will have an impact on whether or not they serve in the military. It is reasonable to believe this generation may find it difficult to maintain a military career for 20 plus years given their need for flexibility. However, there are opportunities for the military recruiting efforts to capitalize on this generation's strong need for healthcare and other benefits.

Generation Z is understandably different and unique from previous generations, including their choices of media and how they interact with the outside world. In the *Journal of Behavioral Studies*, Williams and Page (2011) state television is still the most popular way that this generation encounters the big brands, but also as they age they will respond less and less to being told how to think or feel in response to advertising. Generation Z is most likely to continue trending toward using technology more in their everyday lives. Page says Generation Z is also heavily "influenced by new media, virtual friends, and the power that comes with technology" Technology has opened the doors to a more customized world for this generation to include educational materials, but the increased speed of "cyber-speak" has stunted the attention span while maintaining a heightened "awareness of visuals."

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III. DATA AND METHODOLOGY

A. DATA SOURCES

Several surveys and data sets related to recruiting and advertising were available to us. Initially we sorted through the details of a few to find the one that would provide us with data related to advertising effectiveness. The various data sets available to us were the JAMRS Youth Poll, however that was a poll of the pool of all potential candidates and didn't show who responded to navy advertising. We then look at the NALTS survey, however the data was not reliable and we felt it did not cover all respondents to advertising. Finally, we examined the Navy New Recruit Survey. The new Recruit survey is broken down into multiple sections and provides a holistic view of each recruit who joined the Navy. This survey is however limited to the pool of individuals that actually enlisted and is not inclusive of those individuals that may have seen Navy advertisements and did not enlist. Considering that effective Navy advertising results in a recruit enlisting, the New Recruit Survey is relevant in that it provides us an in in-depth analysis of those for whom advertising was effective. Focusing on and understanding the characteristics and habits of these individuals, we can help make advertising more effective.

The New Recruit Survey is sponsored by the Joint Advertising, Market, Research and Studies program and is given to new recruits to evaluate outlooks, behaviors and reasons for joining. The survey is updated every six months and the data retained by the Navy Recruit Command. The data set for this analysis was taken from The New Recruit Survey for the U.S. Navy, across five waves of questionnaires from October 2012 to October 2014.

1. Wave 1—October 2012—March 2013—13,196 Respondents
2. Wave 2—April 2013—September 2013—13,992 Respondents
3. Wave 3—October 201—March 2014—9,015 Respondents
4. Wave 4—April 2014—September 2014—9,408 Respondents
5. Wave 5—October 2014—March 2015—7,831 Respondents

Based on an individual's birth date they were pre assigned to an age category. Navy Recruiting Command categorizes recruits into the following age groups: 17–19, 20–21, 22–24, 25–29, and 30 and above.

B. METHODOLOGY

The age categories were used to separate the pool of recruits into two groups; Generation Z and Other. We found in our literature review that there was no clear consensus on the start date for Generation Z. Most placed it in the early 1990s with 1990 or 1995 being the most frequent dates used. For our research, we decided to take a blended approach and use mid 1992 as the start date for the cohort. All sources had the length of the generation lasting for at least 10 years to an undetermined future date. Our data was collected between October 2012 and March 2015, the oldest of this group would have been 20 in 2012 and 23 in 2015 while the youngest would have been younger than 17 which is lower than our lowest age bracket. For wave one, this meant that Generation Z came primarily from the 17–19 and 20–21 age group and for wave 5 it came from the 17–19, 20–21, and 22–24 age groups. Since we could not split the age groups and in an effort to maintain consistency, we decided to use the 17–19 and 20–21 age brackets across all waves to define Generation Z. The Other group consisted of everyone else over 21 years old for all waves.

Each survey had different questions, however most of them had a set of core questions that we felt would help us effectively analyze advertising effectiveness. Table 1 lists the questions we chose and then the actual question number from each subsequent survey. While the question numbers have changed the actual wording of the question remains the same.

Table 1. New Recruit Survey Questions

	Question	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5
1	Please rate how much the following people influenced you to join the Navy.	12	13	13	15	16
2	In a typical week, including, weekends, how much time do you spend _____?	15	N/A	N/A	16	N/A
3	Do you remember seeing or receiving any of the following military advertising or promotional materials in the past twelve months?	37	43	44	41	45
4	Please indicate whether or not you have recently seen Navy Advertising in the following media formats.	44	48	49	49	50

An Excel spreadsheet was constructed using the individual responses to each question. This spreadsheet is representative of the data we would use for this project. For each question we selected, we retrieved the total count for each answer for Generation Z age group and then a total count for each answer for the Other age group. In order to make the answers comparable, they were then divided by the total number of respondents in each age group to get a percentage. For example: For the October 2012–March 2013 survey, 3,500 respondents from the Generation Z cohort of 10,153 people answered Not at All for Question 12 A which is 34% of the Generation Z respondents.

C. SELECTED QUESTIONS

Figures 5 through 8 depict the way the questions were laid out and the possible answers.

Figure 5. Question 1

Please rate how much the following people influenced your decision to join the Navy.

	A GREAT DEAL				
	A LOT				
	SOMEWHAT				
	A LITTLE BIT				
	NOT AT ALL				
A. Your mom	1	2	3	4	5
B. Your dad	1	2	3	4	5
C. Your grandparents	1	2	3	4	5
D. Your brother/sister	1	2	3	4	5

Source: Department of the Navy. (2014). *Navy new recruit survey*. Washington, DC: Author

Based on our literature review, this question was selected to determine the strength of parental influence on the new recruits. The responses for this question were divided into the two groups, Generation Z and Other, and then looked at across all five waves.

Figure 6. Question 2

In a typical week, including weekends, how much time do you spend _____?

	MORE THAN 21 HOURS				
	15-21 HOURS				
	8-14 HOURS				
	1-7 HOURS				
	I NEVER DO THIS				
A. Reading magazines	1	2	3	4	5
B. Reading newspapers	1	2	3	4	5
C. Reading books	1	2	3	4	5
D. Watching TV	1	2	3	4	5
E. Using email	1	2	3	4	5
F. Accessing the Internet via a computer	1	2	3	4	5
G. Accessing the Internet via a mobile phone/device	1	2	3	4	5
H. Listening to streaming radio via computer or mobile device	1	2	3	4	5
I. Watching streaming videos via computer or mobile device	1	2	3	4	5
J. Texting	1	2	3	4	5
K. Playing mobile games/game apps	1	2	3	4	5
L. Using mobile apps for something other than games or email	1	2	3	4	5
M. Playing video game systems (e.g., PlayStation)	1	2	3	4	5
N. Playing online games/engaging in virtual worlds	1	2	3	4	5
O. Listening to the radio	1	2	3	4	5

Source: Department of the Navy. (2014). *Navy new recruit survey*. Washington, DC: Author.

This question was chosen to study the media choices of the two groups, with an emphasis on the response of “I never do this”. The data for the “I never do this” response was the only data analyzed across time and across the two groups, because it was inconsequential to our analysis in how much time was spent on each medium. Instead, we chose to analyze the percentage of occurrence for each medium listed and how responses

differed between the groups and across time. This particular question was only found in the wave 1 and wave 4 surveys, so only two distinct points in time were analyzed.

Figure 7. Question 3

Do you remember seeing or receiving any of the following military advertising or promotional materials in the past twelve months? (mark all Services that apply)

	NO					
YES, FOR THE COAST GUARD						
YES, FOR THE AIR FORCE						
YES, FOR THE MARINE CORPS						
YES, FOR THE NAVY						
YES, FOR THE ARMY						
A. Advertising on television	1	2	3	4	5	6
B. Advertising in a magazine	1	2	3	4	5	6
C. Advertising on the Internet	1	2	3	4	5	6
D. Advertising at a movie theater	1	2	3	4	5	6
E. Advertising on the radio	1	2	3	4	5	6
F. Promotional materials I received in the mail or through email	1	2	3	4	5	6

Source: Department of the Navy. (2014). *Navy new recruit survey*. Washington, DC: Author.

This question was chosen to analyze the correlation between the recall and the medium on which it was advertised. Only the response “Yes, for the Navy” was used in our analysis because we are not concerned with the recollection of other services advertisements.

Figure 8. Question 4

**Please indicate whether or not you have recently seen
Navy Advertising in the following media formats.**

(mark all that apply)

- ① Television
- ② Online (Internet)
- ③ Print (newspapers, magazines, etc.)
- ④ On-base advertisements (billboards, messaging, etc.)
- ⑤ Direct mail or email
- ⑥ I haven't seen the current Navy Advertising Campaign in any of the above.

Source: Department of the Navy. (2014). *Navy new recruit survey*. Washington, DC: Author.

This question was selected to assess short-term recall for Navy advertising media.

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IV. ANALYSIS

This chapter will address how each of the four selected questions was analyzed. Each section that addresses a question will begin with a hypothesis based on information found in the literature review, an explanation of how the data was organized, an analysis of the data, and a conclusion.

A. ANALYSIS OF PARENTAL INFLUENCE.

1. Hypothesis

The first question we addressed was the impact that parental influence has on new recruit's decision to enlist. The literature review depicts that Generation Z places a higher value on parental advice than previous generations and would turn to them when making big decisions. Our hypothesis is that we should find a positive trend in parental influence for the Generation Z cohort.

We would also expect that as people get older, they gain more independence from their parents and the level of parental influence would decrease. This would occur regardless of generational persuasions. For instance, a 17–19-year-old recruit would be more reliant on their parents for advice than a 25–27-year-old simply because the younger recruit has been living with their parents and has not yet had a chance to live separately and make independent decisions like an older recruit would have.

2. Data Organization

The question analyzed is worded as: “Please rate how much the following people influenced your decision to join the Navy”. Each recruit was able to select from a Likert scale of five responses listed as: Not at All, A Little Bit, Somewhat, A Lot, or A Great Deal. The question separated out mothers and fathers as two separate influencers, so the data was combined on both for analysis and the results were assessed to find a combined conclusion on parental influence.

In order to map trends, we decided to focus on the extremes of the data. We first looked at those who reported that their mother and father had no influence on their

decision to enlist. We would expect to find a negative trend in this data as more recruits would report some level of parental influence. Additionally, in order to confirm our results, we looked at the furthest extreme of those recruits who reported that their mother and father provided A Great Deal of influence on their decision to enlist. We would expect that this data would show an increase.

The raw quantity who answered for each question was divided by the total respondents in the wave to get a percentage who answered. For example; if 2,000 out of 10,000 Generation Z respondents answered that their parents had a lot of or a great deal of influence on their decision to join, then that category would be 20% of the respondents.

Table 2. Parental Influence Data

Mom - Not at all	Wave1	Wave2	Wave3	Wave 4	Wave 5
Generation Z	34%	34%	37%	37%	32%
Other	47%	43%	47%	45%	39%
Dad - Not at All	Wave1	Wave2	Wave3	Wave 4	Wave 5
Generation Z	36%	37%	38%	39%	35%
Other	47%	45%	48%	46%	40%
Mom A Great Deal	Wave1	Wave2	Wave3	Wave 4	Wave 5
Generation Z	16%	17%	15%	15%	17%
Other	13%	14%	12%	14%	16%
Dad - A great Deal	Wave1	Wave2	Wave3	Wave 4	Wave 5
Generation Z	18%	19%	18%	17%	20%
Other	14%	15%	13%	14%	18%

3. Analysis of Not at All Influence

The following graphs look at trends for recruits who report that their mother and father did not have any influence on their decision to join the Navy.

Figure 9. Mom—Not at All

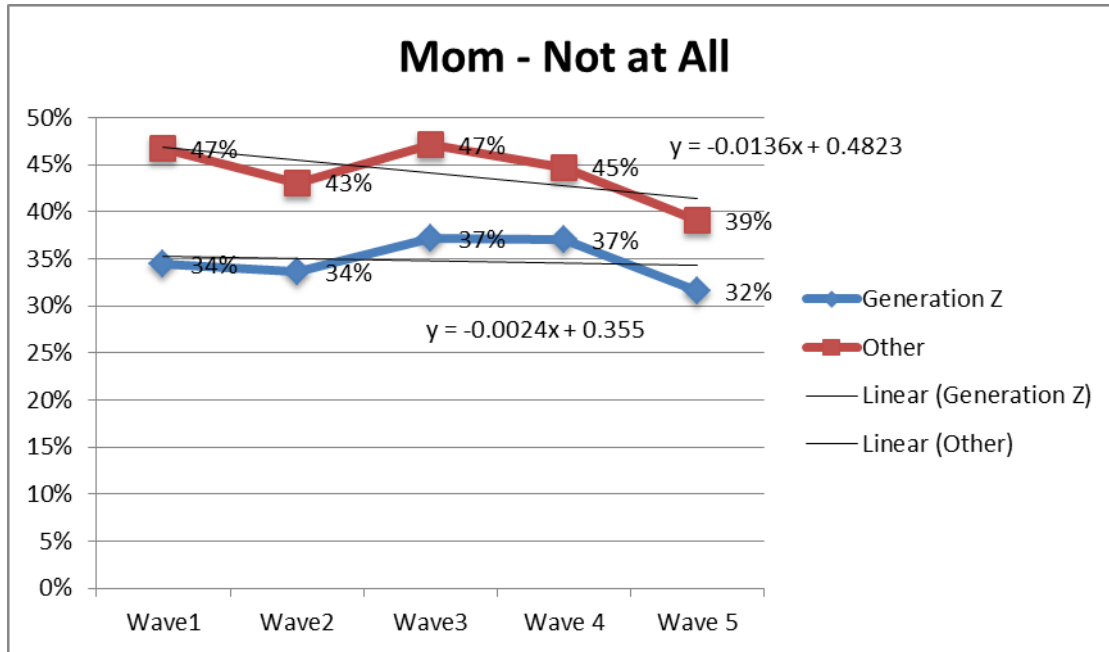
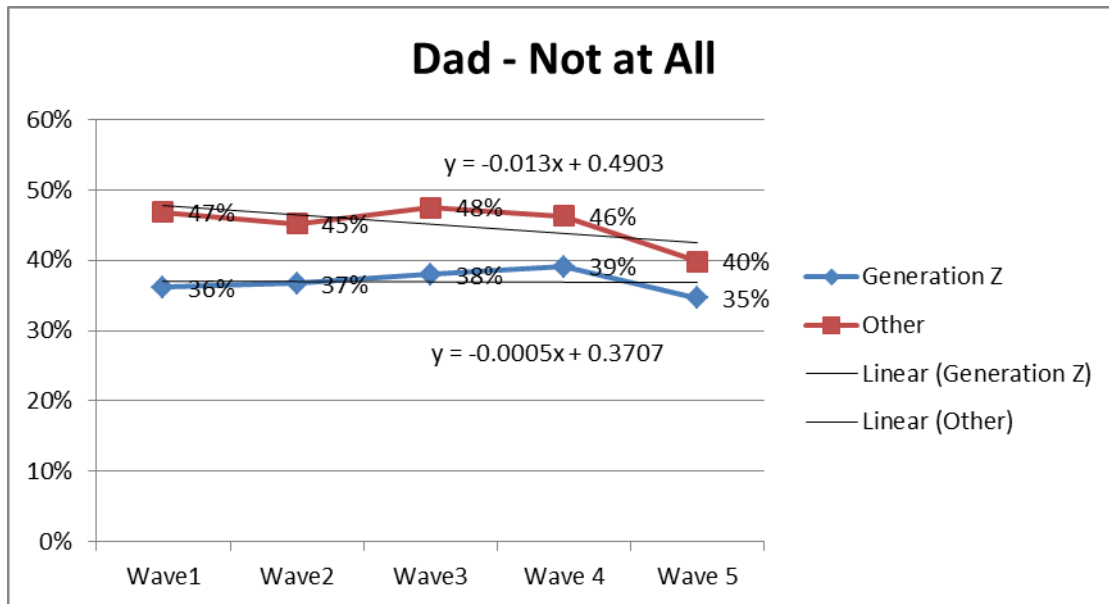


Figure 10. Dad—Not at All



It appears that, in general, slightly more than a third of recruits from the Generation Z cohort were not significantly influenced by their mother and father in

making their decision to join the Navy while less than half of older recruits were not significantly influenced by their parents.

As expected, there is a gap in parental influence where the Other cohort of older recruits seems to be more independent than the Generation Z cohort. The trend in the data among Generation Z is virtually flat indicating almost no change in the cohort relying less on their parents; however it is low to begin with 2/3 of them showing some level of influence from their parents. The Other cohort demonstrates a larger decline in reporting no influence from their parents meaning that over time more and more of them are being influenced by their parents to some degree.

The gap between the two cohorts appears to be narrowing over the waves. In this case, the gap is cut in half for both parents. For mothers, in wave one, the gap between the cohorts was 13% points which progressively narrowed to 7% in wave 5. For the father's influence, the gap also narrowed from 11% in wave 1 to 5% in wave 5.

4. Analysis of A Great Deal of Influence

The following graphs look at trends for recruits who report that their mother and father had a great deal of influence on their decision to join the Navy.

Figure 11. Mom—A Great Deal

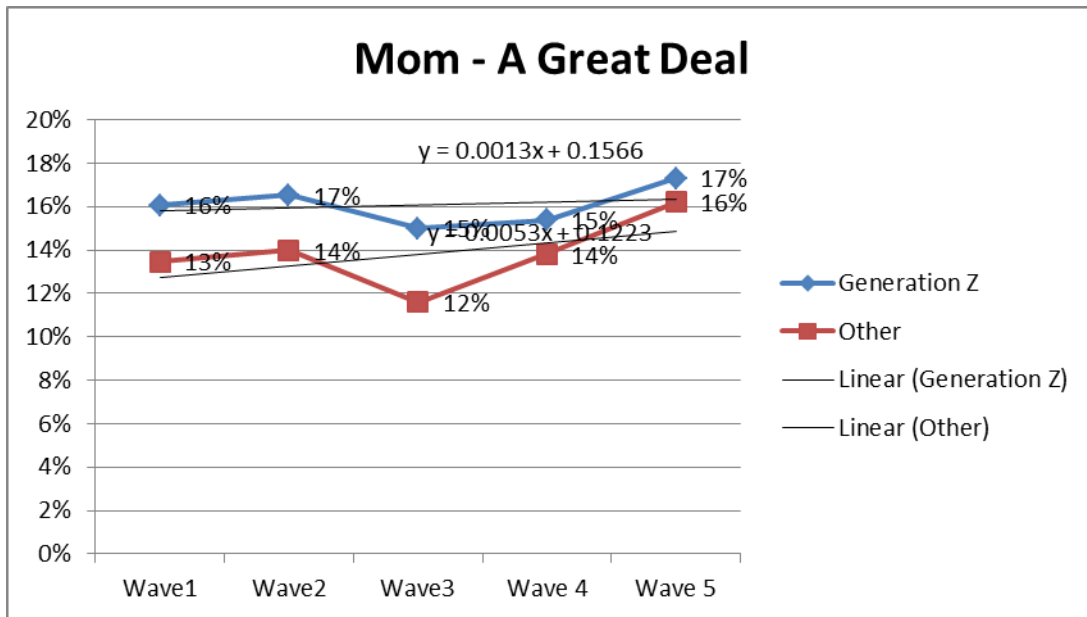
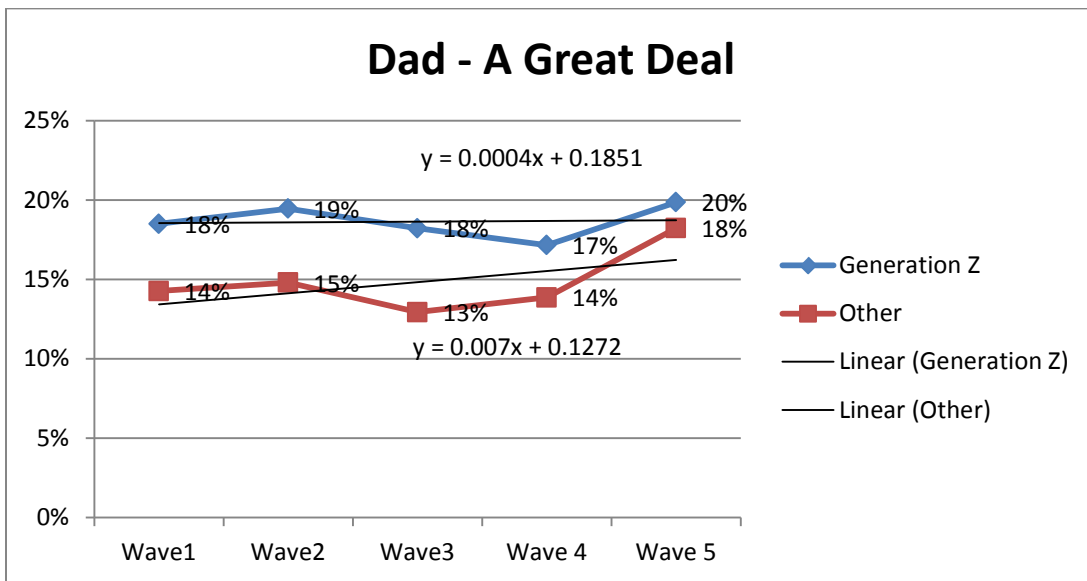


Figure 12. Dad—A Great Deal



It appears that in general mothers and fathers provide a great deal of influence to about 15% to 20% of recruits. There is a slight positive trend in the data among Generation Z pointing toward the cohort relying more on both their mother and father.

There is an even more positive increase in the older cohort showing a growing propensity for older recruits to value the influence of their parents.

As expected, there is a gap in the level of both parent's influence where the Generation Z cohort relies more on their parents than the Other cohort which we believe is mostly due to the independence experienced by older recruits. This gap between the two cohorts appears to be narrowing. For mothers, in wave one, the gap between the cohorts was 3% points which progressively narrowed to just 1% in wave 5. For the father's influence, the gap also narrowed from 4% in wave 1 to 2% in wave 5.

5. Conclusion

The data does not support our hypothesis that younger members, those from Generation Z, are being more influenced by their parents. While the data shows that they are more influenced than the Other cohort, we were unable to see much of a decline in those reporting no influence or an increase in those reporting a great deal of influence. The results in the Other cohort of older recruits supports our hypothesis that they are more independent, however it seems that the older cohort is growing less independent and more willing to rely on their parents to influence their decision. While this is surprising, it could be that the beliefs and attitudes of Generation Z took hold earlier than expected and as the millennial generation moves on, the new characteristics will get stronger.

B. RECOLLECTION OF ADVERTISEMENTS BY MEDIA FORMAT

1. Hypothesis

Using the information gathered in the literature review we would expect that television and online advertising account for the majority of material remembered by new recruits. Additionally, we would expect that the older group (other than Generation Z) listens to the radio more often and reads more magazines therefore they would remember a Navy advertisement from those two sources more than Generation Z new recruits would.

2. Data Organization

The data gathered for the question “do you remember seeing or receiving any of the following adverting or promotional materials in the past twelve months?” is from a series of five consecutive New Sailor Surveys beginning in October 2012 and ending in March 2015. We then compiled a simple chart showing the total number of respondents that answered the question with respect to Navy advertisements or promotional materials as well as those respondents that said they did not see any advertisements or promotional materials. These two groups of responses were broken down once more into Generation Z and those respondents who are “Other” than Generation Z.

In response to the question the New Sailors were given six options to choose from: A. Commercial on Television, B. Ad in a Magazine, C. Ad on the internet, D. Ad at the Movie Theater, E. Ad on the Radio, and F. Promotional materials I received in the mail or through email. If the sailors remembered seeing or receiving any of the ads they were able to mark types of advertising they recalled seeing.

In Table 3, Generation Z respondents are depicted in blue while those other than Generation Z are red. The first four columns in the chart show the actual number of respondent who selected an answer (A through F). Additionally, the table shows those respondents who said they saw no advertisements in the last 12 months via that particular advertisement medium. For example, 6,923 Generation Z New Sailors said they remember seeing a Navy advertisement on television in the last 12 months while 1,530 Generation Z New Sailors said they did not or do not remember seeing a Navy advertisement on television in the last 12 months. The last four columns represent the percentages of total respondents. This means we know that 10,153 Generation Z New Sailors took this survey and 6,923 of them said they saw a Navy ad on television which is the same as saying 68% of Generation Z New Sailors who took this survey remember seeing a Navy television advertisement in the last 12 months. Likewise, 3,043 Other New Sailors took this survey and 2,105 of those New Sailors said that they remember seeing a Navy advertisement on television in the last 12 months, which is 69%. This same method was used for each of the five waves.

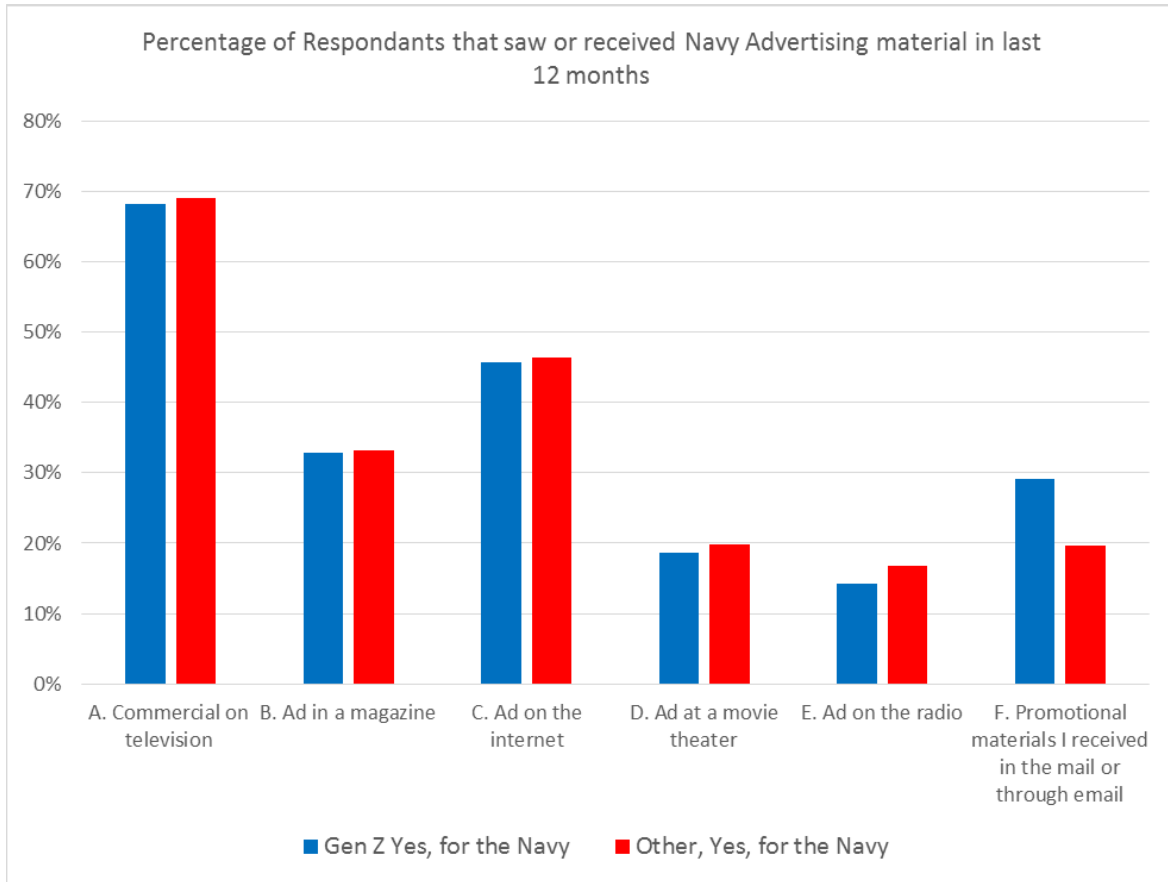
Table 3. The First Wave of Respondents (October 2012 to March 2013)

Oct 12- Mar 13 Wave 1									
Question 37									
	Gen Z Yes, for the Navy		Gen Z, None		Other, Yes, for the Navy		Other, None		
A. Commercial on television	6923	1530	2105	574	68%	15%	69%	19%	
B. Ad in a magazine	3341	4954	1008	1560	33%	49%	33%	51%	
C. Ad on the internet	4642	3843	1414	1223	46%	38%	46%	40%	
D. Ad at a movie theater	1900	6451	601	1922	19%	64%	20%	63%	
E. Ad on the radio	1440	7144	510	2098	14%	70%	17%	69%	
F. Promotional materials I received in the mail or through email	2959	5605	600	2096	29%	55%	20%	69%	

3. Analysis of Responses; Generation Z versus Other

The percentages for each category were used to form column charts so the data could be easily compared across the various advertisement medium as well as between the two survey populations. The column chart shown in Figure 13 is a graphical representation of Table 3 for wave 1.

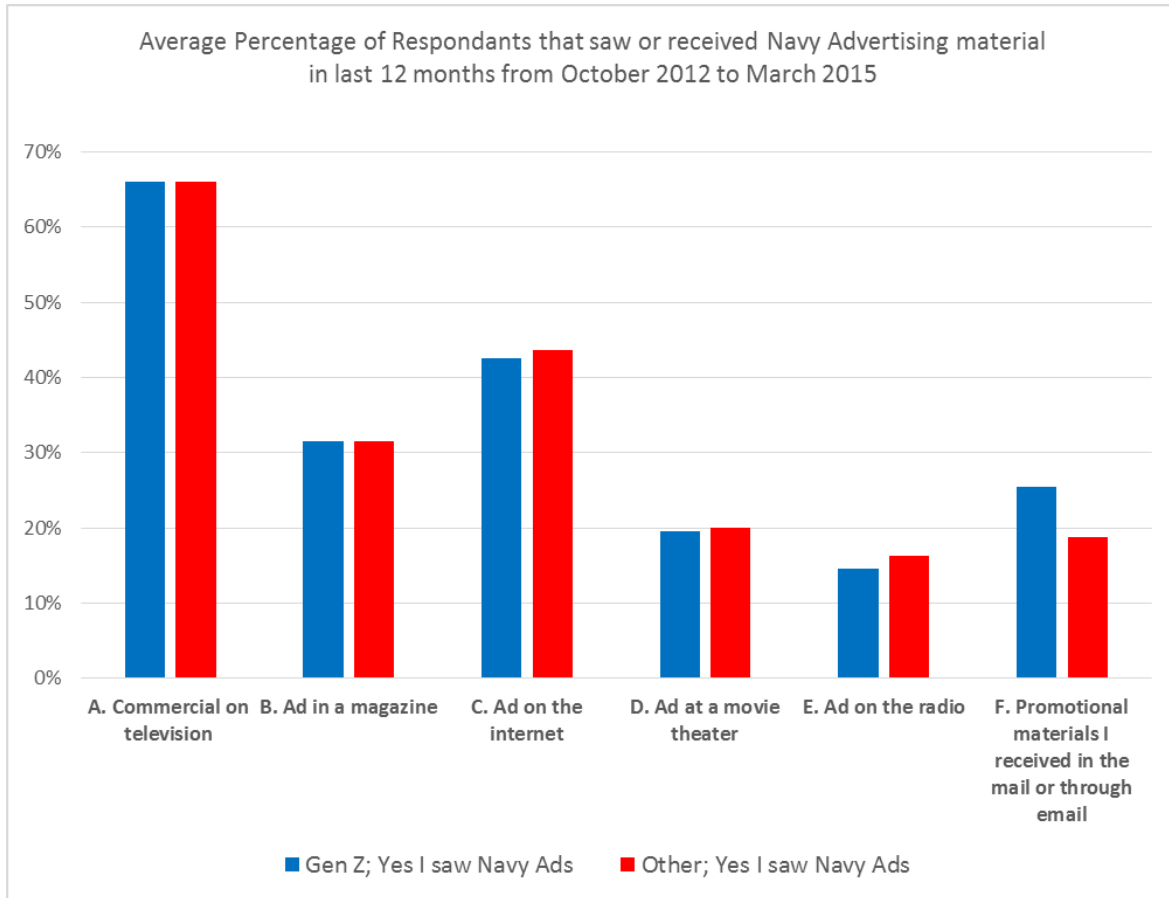
Figure 13. Wave 1 Column Chart



As you can see from Figure 13 it appears that Generation Z consumes its advertisement and promotional materials in nearly the same fashion as those New Sailors who are classified as Other. The largest and most noted difference in the chart is in the direct mail category, part F.

When compared overtime (wave 1 through 5) there were no major changes in the way advertising information was being consumed or at least remembered. For example, from waves 1 through 5 the percent of Generation Z New Sailors who remembered hearing a Navy Advertisement on the Radio are as follows: 14%, 16%, 13%, 16%, 14%. Because of this consistency regardless of wave number, a simple average of the responses was taken and a new column chart was generated (see Figure 14) showing the average consumption pattern over the period beginning in October 2012 and ending in March 2015.

Figure 14. Average column chart



4. Conclusion

By comparing the column chart from wave 1 to the column chart showing the average of all five waves, it can be seen that there are no major changes. On average, New Sailors remember advertisements seen over and through different medium about the same.

C. ANALYSIS OF MEDIA FORMATS

1. Hypothesis

Based on the literature review conducted with regards to Generation Z, we were informed on how different and unique the new generation Z would be from the Other Generation. Prior to the analysis of the data from the questions we hypothesized that

Generation Z would show significant statistical differences when compared to the other generation. Mainly we expected Generation Z to be heavily “influenced by new media formats, virtual friends, and the power that comes with technology” (Williams & Page, 2011). The expectation was to be able to analyze those trends, if any, and data variances.

2. Data Organization

During October 2012 and March 2015, Sailors were asked to answer the following question from the New Recruit Survey, “Please indicate whether or not you have recently seen Navy advertising in the following media formats?” The survey provided Sailors with 6 different options to choose from. The following options were provided:

1. Television
2. Online (internet)
3. Print (newspaper, magazines etc.)
4. On-base advertisements (billboards, messaging, etc.)
5. Direct mail or email
6. I haven’t seen the current Navy advertising Campaign in any of the above

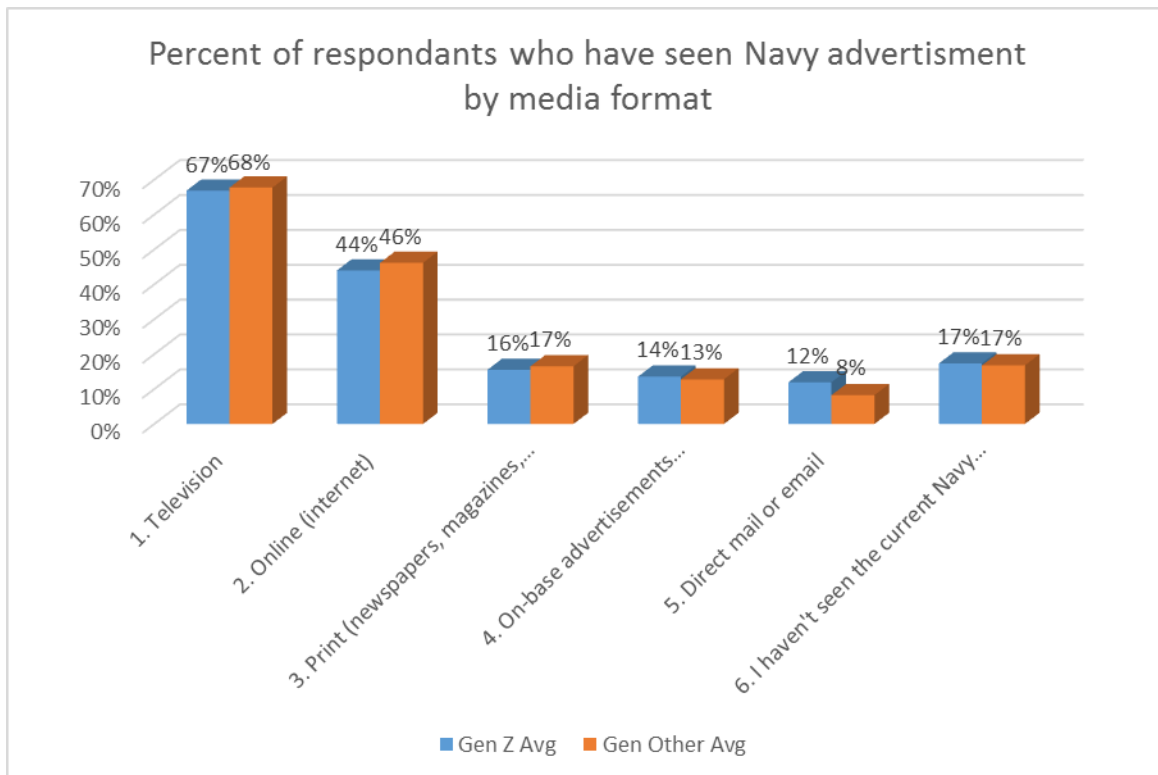
During this period total population in the study was 53,442 Sailors surveyed. This figure is composed of 41,626 Sailors from generation Z and 11,816 Sailors from the Other Generation.

3. Analysis

Studies of the survey results collected between October 2012 and March 2015 revealed a very small variation in how Generations Z and the Other differ when answering the question with regards to the type of media format they utilized when recalling navy advertising. From a total population of 53, 442 Sailors, 36,092 of those indicated that Television was the media format they had recently seen a Navy advertisement. This figure accounts for 68% percent of the total population that was surveyed; where on average 67% of Generation Z responses and 68% of Generation Other responses have identified Television as the number one format used when recalling

a recent Navy advertisement. Accordingly, Generation Z Sailors indicated having seen less Navy advertisement on Television than Generation Other by a 1% margin. Although Generation Z is approximately 56% larger than the Other Generation in this survey, the data reveals that their average response is closely related to each other as it is depicted on Figure 15.

Figure 15. Generations Z and Other Responses, October 2012 to March 2015



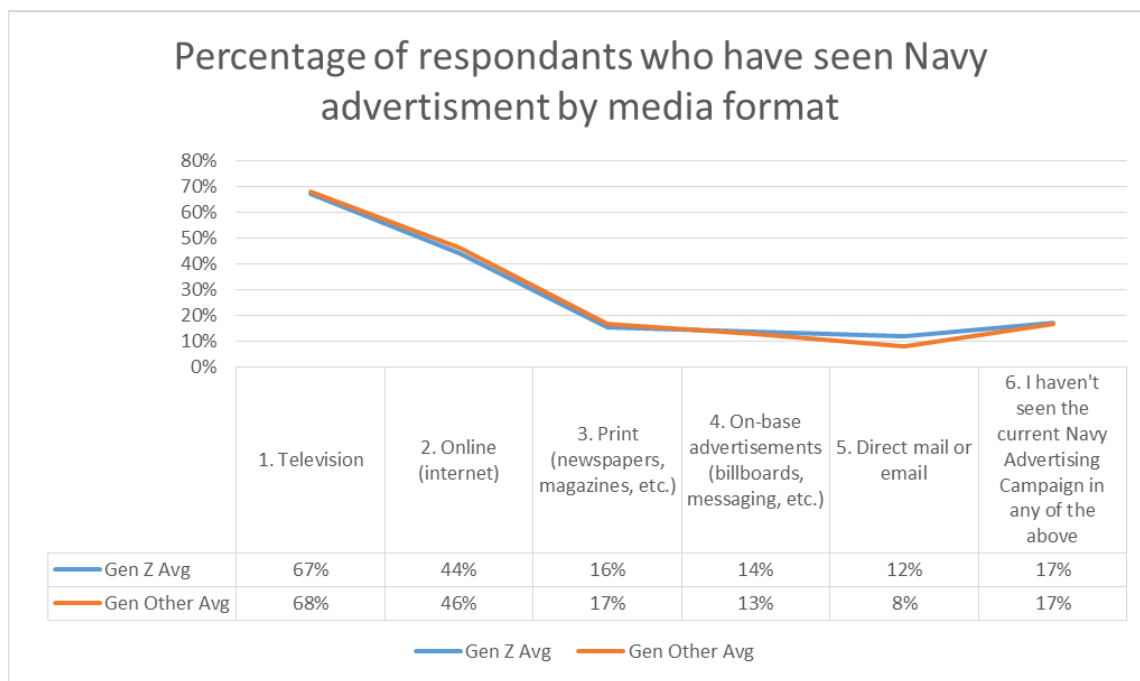
With regards to Online (or internet) advertising 23, 928 of new Sailors stated they have recently seen Navy advertisement while online or in the internet. This accounts for 45% of the total Sailors surveyed.

On average 44% of Generation Z responses in addition to 46% Generation Other responses indicated that they have recently seen Navy advertisement while online or on the internet. Accordingly, 2% fewer of the Generation Z respondents said they saw advertising on the internet when compared to not Generation Z respondents.

Additionally, 8, 509 or a 16% of the new Sailors indicated having recently seen Navy advertising on print media (newspapers, Magazines, ETC.). On average 16% of Generation Z responses and 17% from Generation Other indicated having seen Navy advertisement on print media. Generation Z has 1% fewer new sailors who have seen Navy advertisement on print media when compared to Generation Other.

Following the print media option, there were 7, 221 of new Sailors who saw on-base advertisements (billboards, messaging, etc.). On average, 14% of Generation Z responses and 13% from Generation Other indicated having seen on-base advertisements. These results suggest that Generation Z is 1% more likely to have seen Navy advertisements on-base than Generation Other.

Figure 16. Responses Trendline from Gen Z and Other, October 2012 to March 2015



Up to this point and based on the results collected and reviewed, the differences found regarding the advertising media for both Generations is minimal as reflected in Figure 16. However, with regards to direct mail or email advertisement there is a 4% spike in average difference on how both generations respond to this type of

advertisement. In particular, Generation Z Sailors averaged a 12% response rate compared to an 8% response rate from the Other Generations. This indicates that during this period Generation Z is 4% more likely to have seen a Navy advertisement by direct mail or email.

4. Conclusion

Overall the data reflects minimal differences between Generation Z and Generation Other with regards to media advertising formats. Television dominated as the most popular response. Online media formats were selected as the second most popular followed by print, on-base and direct mail/email advertisement. However, it remains to be seen how Generation Z will grow apart and differentiate from the Other Generation with regards to how they respond to direct mail or email advertisement.

D. TIME SPENT ON MEDIA FORMATS

1. Hypothesis

Based on the known differences between Generation Z and Other outlined in the literature review one would expect to see wide differences in the use of social media. Generation Z would be expected to use the internet more often, while not using the traditional sources of media such as television and radio.

2. Data Organization

During the October 2012 and April 2014 recruit surveys (Wave 1 & 4), respondents were asked to answer the following question, “ In a typical week, including weekends, how much time do you spend ____?” The survey provided respondents with 15 different media types to answer. The media types are as follows:

1. Reading magazines
2. Reading newspapers
3. Reading books
4. Watching TV
5. Using email

6. Accessing the Internet via a computer
7. Accessing the Internet via a mobile phone/device
8. Listening to streaming radio via computer or mobile device
9. Watching streaming videos via computer or mobile device
10. Texting
11. Playing mobile games/game apps
12. Using mobile apps for something other than games or email
13. Playing video game systems (e.g., PlayStation)
14. Playing online games/engaging in virtual worlds
15. Listening to the radio

The respondents had the following choices on the survey to these questions:

- I never do this
- 1–7 hours
- 8–14 hours
- 15–21 hours
- More than 21 hours

In order to compare Generation Z to Other it was decided to look directly at the responses for “I never do this” to compare the groups. This information was graphed according to the percentage of respondents that answered “I never do this”.

3. Analysis

Generation Z has defining characteristics based on their media consumption habits, as seen from Figure 17. Generation Z is compared to the other generations as far as their media habits, from reading magazines to listening to the radio in Figure 17. Figure 18 further compares the media habits for Generation Z and Other, but also across time for the wave 1 survey (October 2012) to the wave 4 survey (April 2014). Generation Z differs greatly from other generations in their use of magazines, newspapers, books, and email as seen from the media use charts.

Generation Z states they never read magazines 66% of the time versus 48% for other generations, which gives credence to the notion Generation Z uses the internet for reading content. Magazines are static without the rich content the internet is able to bring to life and Generation Z, as identified in the literature, requires instant information gratification instead of waiting for a magazine through the mail. It also appears that the use of magazines is declining for both Generation Z as well as the other generations from the October 2012 survey to the April 2014 survey as shown in Figure 18. Generation Z went from 66% never read a magazine to 72% never reads a magazine over this two year span from wave 1 until wave 4 surveys (October 2012 and April 2014 respectively).

Generation Z never reads newspapers 59% of the time versus 40% for other, further labeling this generation as part of the information age. Generation Z is known for always having a smart phone for internet access, so these numbers are not surprising considering this generation does not see the need for a hard copy of this media type. Also, this trend is continuing from the wave 1 survey until wave 4 with Generation Z going from 59% to 68% never reading a newspaper (see Figure 18)s This is a trend likely to continue for the foreseeable future given this generations characteristics.

Figure 17. How Much Time Do You Spend Doing These Activities?

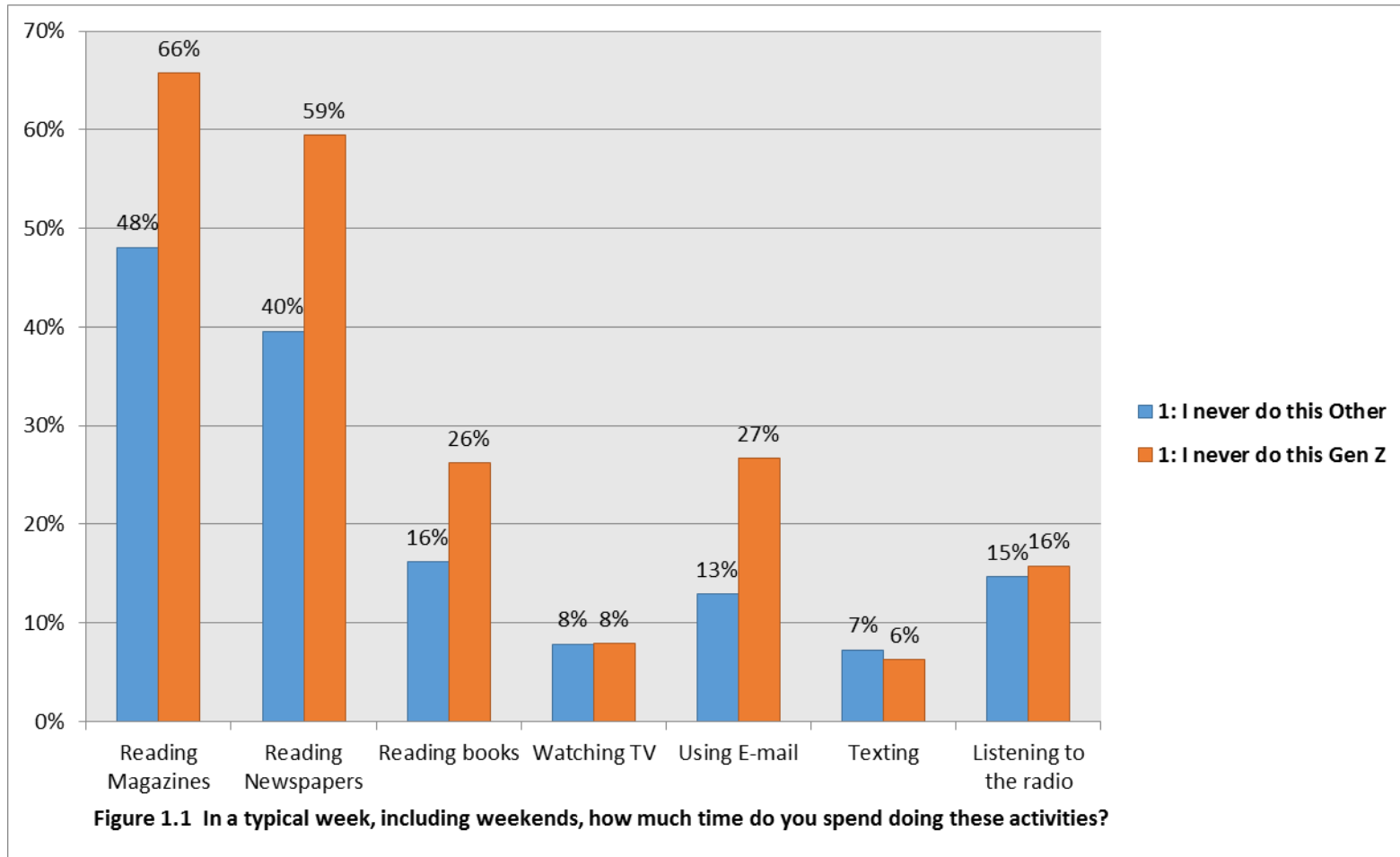
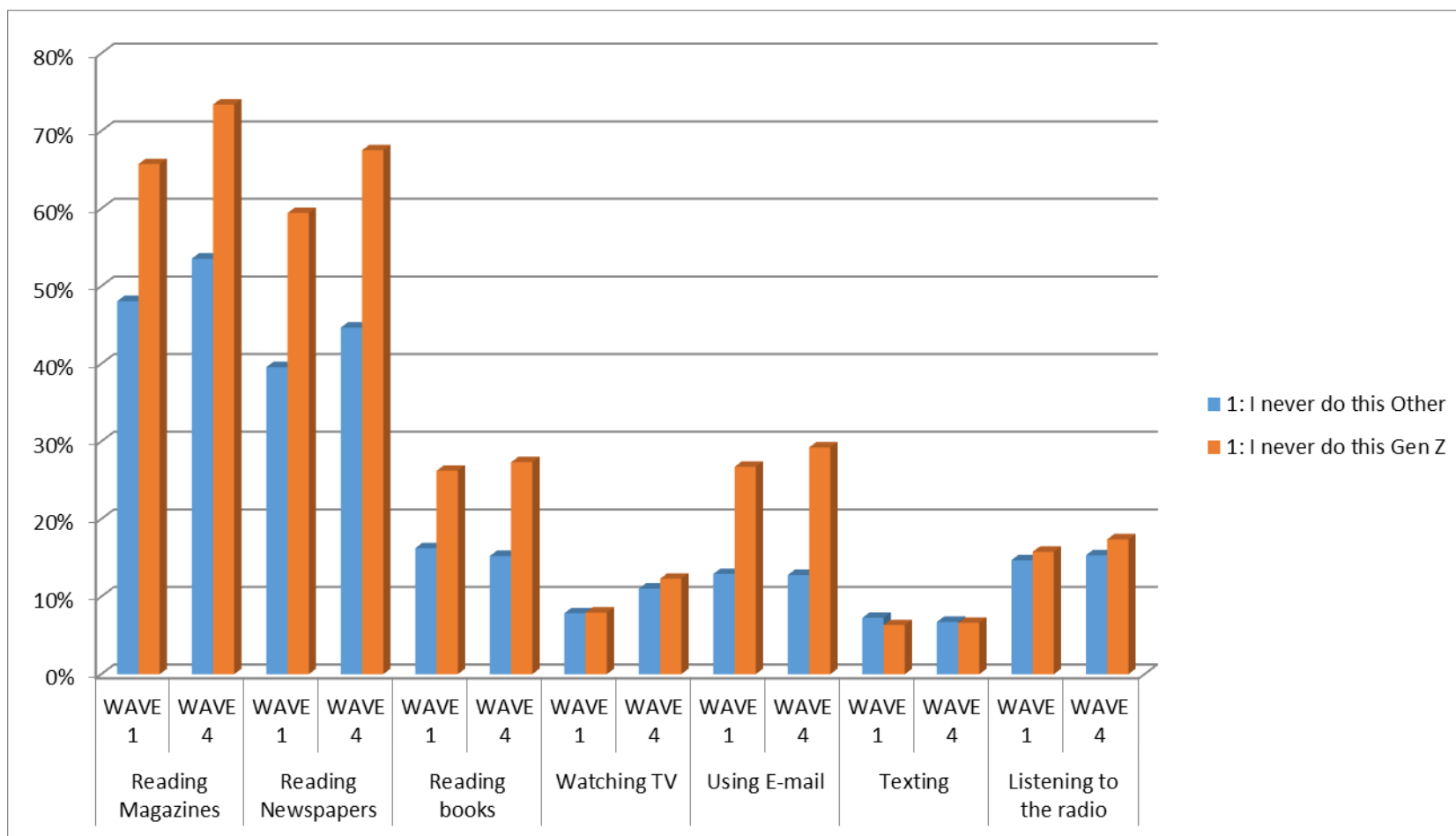


Figure 18. Comparison of Media Habits for Generation Z to Other



Generation Z also does not read books as much as previous generations 26% versus 16% respectively according to the sampled population in the recruit surveys. However, the data shows this is not a trend that is declining, because from wave 1 to 4 surveys show almost equal percentages for both Generation Z and Other.

Both Generation Z and Other do however equally watch television as seen in the survey results. Television is still the most popular way to reach this new generation Z, so the results are not surprising, but it does seem counterintuitive that this generation would still find the time to watch television given all the competing media choices available to them on-demand. (Williams & Page, 2011) Television viewership is declining across the wave 1 to 4 surveys for both Generation Z and Other, but for just a small percentage (8% to 12%). This trend seems to be happening to both Generation Z and Other over this survey period for wave 1-4.

Listening to the radio seems to be the next most popular media choice for respondents 16% for Generation Z, so 84% of respondents do listen to the radio. The data from wave 1 to 4 shows no significant change in how respondents listen to the radio, so this media choice is a strong second only to television for reaching Generation Z.

4. Conclusion

The significant take away from this data set is that the data supports the notion that Generation Z does not prefer tactile media choices, i.e., newspapers, magazines, and books. They do however still find time to watch television, which the data shows strong support for both Generation Z and Other equally watching television. Most of the other media choices are about equally distributed for both Generation Z and Other, so it is difficult to make a distinction between them for Generation Z.

If we are using this data set to support media decisions for recruit advertising, then television seems to be where the majority of the recruiting dollars should be spent. Clearly, television is the media choice winner for both Generation Z and Other with 92% of respondents saying they watch television the highest among all media choices. Radio is a close second with 84% of Generation Z respondents and 85% of Other stating they

listen to the radio. With the decline in readership for tactile media choices, among both Generation Z and Other, there may be no need for the Navy to advertise in these media choices to reach recruits. Only a small percentage still read magazines (34% Generation Z), so eliminating or severely limiting spending in these areas would help the Navy target the still viable Television and Radio media choices.

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V. CONCLUSIONS AND RECOMMENDATIONS

Our study used trend data to observe differences between Generation Z new sailors and new sailors from older generations. The objective was to look at advertising and assess the differences in the behavior of these two groups. Ultimately, we are seeking to better understand Generation Z and effectively advertise to them. The US Navy must continue to focus advertising toward this new Generation Z in order to recruit them, but to accomplish this goal we must understand how to reach them.

During our analysis we focused on the data of four defining questions from the new recruit survey to help with our understanding of the differences between the two generations. The four questions selected for analysis centered on parental influences, social media habits, and advertisements received or viewed by the recruits. A conclusion for each of these categories is provided as follows:

A. PARENTAL INFLUENCE

Parents have always been a big part of the recruiting effort. While our data show that younger recruits from Generation Z give a high value to parental input, it also shows that the older cohort is acting more like Generation Z and are more willing to take the advice of their parents when making an important decision such as enlisting. The Navy should be aware that this is occurring and use this data to be more effective in their advertising. If it is not only Generation Z but the entire pool of potential recruits who value their parent's advice, then it would be beneficial for the Navy to tailor their advertising toward parents and run advertising campaigns that stresses issues that are important to parents. Advertising directly to parents in media that only parents consume could be an effective way to reach out to influencers of potential new sailors.

B. NAVY ADVERTISEMENT RECALL

Using the information gathered from analyzing question 2 decision makers may be able to make better decisions. For example, about 67% of all respondents remember seeing Navy advertisements on television whereas only about 15% remember hearing a

Navy advertisement on the radio. This is to say that nearly all respondents, keeping in mind these respondents have successfully enlisted in the Navy, consume ads at about the same rate. Therefore, we know that whether we are targeting high school seniors or those who have been out of high school for a couple of years we can use the same advertising medium. However, Dertouzos and Garber argue an interesting point about the specific case of a high school junior. They say that as a junior in high school the person may not have long term feelings about career choices in general but as time goes on advertising can affect their feelings and become more important when they are considering career alternatives (Dertouzos & Garber, 2003, p. 28). This ties back to what we learned in the literature review, the way advertising effects a person's decision making process when contemplating career choices can be immediate or delayed for many years.

About two thirds of new recruits say they remember seeing Navy advertisements on television, whereas only about one third of all new recruits said they remember seeing a Navy advertisement in a magazine. Knowing that there is such a large variance between the two mediums and combining this with the information we gathered about how often Generation Z uses different kinds of medium Navy Recruiting leadership may be able to make more informed advertising decision.

For example, spending and advertisement prioritization can be influenced due to the fact that the data shows that overtime fewer individuals are reading magazines and of those who joined the Navy only about one third of them remember seeing an advertisement in a magazine. However, this does become a hard decision when advertisers try to assess the utility of the ads based on other factors like whether or not they are tactile. An argument can be made that while television commercials reach a wide audience and many new recruits remember seeing them the commercial and the details may be gone just minutes after viewing it. A magazine advertisement can be saved and looked at over and over. This is where an argument can be made that all advertisement impressions may not be equal. Television advertisements may offer the most impressions per dollar spent but is each television impression as effective as each magazine impression? If a potential recruit saves the magazine advertisement and hangs it in their

room or locker to be seen every day do that provide more impact? This may be an area for further research.

Using this data, decision makers should focus and manage the Navy's advertising budget accordingly. It appears from the young men and women who enlist television and the internet are the two largest sources from where the New Sailors remember advertisement and promotional information.

The most noted difference between the two groups is difference in the response to the last part of the question having to do with promotional materials received through the mail. To this point Dertouzos and Garber also note that in the military marketing leads that they analyzed most (78%) of those leads were from direct mail responses. Meaning, that a large number of individuals who received direct mail responded to it. They also go on to note that leads from direct mail impressions and print advertisements do not directly equate to signed contracts. They concluded that different media may be more effective in reaching different target populations, the same conclusion can be drawn from our analysis of the New Recruit Surveys (Dertouzos & Garber, 2003, pp. 28-29).

C. NAVY ADVERTISING MEDIA FORMAT

Based on our analysis of the data, we concluded that there are no significant differences or variations shown between both generations when it comes to the type of media format they use. In fact, what we learned was that most of the answers between generation Z and the others were almost analogous to each other. Television and online formats remain the most popular media formats chosen by both generations followed by Print, on-base and direct mail/email advertisement.

However, with regards to direct mail or email responses, our data results indicate a steady trend forming which separates the two generations by a 4% margin in how they differ during our period of study. As a result, Generation Z is 4% more likely to have seen a Navy advertising using this format when compared to the other generations. Much like other forms of advertising direct mail is effective in increasing awareness of a particular product and when it is mailed directly to you there is more of a personal feel to the advertisement.

D. SOCIAL MEDIA HABITS

Newspaper, magazine, and book readership is very low for both Generation Z and Other. Furthermore, this trend seems to be continuing with a further decline in readership between wave 1 and 4 surveys. However, television and radio both seem to be about equal among Generation Z and Other. There is no evidence of a downward trend for television or radio viewership among either group.

If Generation Z is the target audience, then advertising in newspapers, magazines, or books would not produce positive results according to the survey responses. However, television and radio are still favorable media avenues to pursue for both Generation Z and Other recruits. Also, based on evidence from parental influences on Generation Z, it may be beneficial to target advertising at the parents of Generation Z in order to help influence them positively with a strong Navy brand message. The parental advertising could be done in newspapers, magazines, or books but the message needs to be clearly targeted at the parents to help them influence their child's decision to join the Navy.

E. CONCLUSION

In closing, we feel that our study has identified certain areas where future changes and improvements can be made in order to influence the navy recruiting and advertising goals. Results from our study can influence advertisement targeting goals and also better aid in the budgeting process where we seek to achieve efficiency and effectiveness. The data can be used to create future marketing and advertising strategies that better target Generation Z. Additionally, in the future when a significant technology or life events occur that begin to shape a new generation Navy Recruiting Command should work with advertisers to better target that new generation.

F. RECOMMENDATIONS FOR FUTURE RESEARCH

Future research projects should continue using the New Recruit survey data as it becomes available in order to further analyze trends over time. Additionally, future researchers should attempt to link the survey data to the Navy's 3C1L recruiting and advertising budget.

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